

2019 Greenwich Leaders: U.S. Institutional Investment Management Service

Q1 2020

The 2019 Greenwich Quality Leaders in U.S. Institutional Investment Management Service are AB, Baillie Gifford, NISA Investment Advisors, and PIMCO. These asset managers have distinguished themselves from competitors by delivering superior levels of client service that help institutional investors achieve their investment goals and objectives.

Greenwich Quality Leaders – 2019



Overall U.S. Institutional Investment Management Service Quality

Investment Manager

AB
Baillie Gifford
NISA Investment Advisors
PIMCO

Note: Based on interviews with 1,100 institutional investors. Quality leaders are listed in alphabetical order.

Source: Greenwich Associates 2019 U.S. Institutional Investors Study

Consultants *Andrew McCollum, Davis Walmsley, Sara Sikes, and Susan Gould* advise our investment management clients in the United States.

METHODOLOGY

Between July and October 2019, Greenwich Associates conducted interviews with 1,100 senior professionals at 896 of the largest tax-exempt funds in the United States, including corporate and union funds, public funds, endowments and foundations, insurance general accounts, and healthcare organizations, with either pension or investment pool assets greater than \$150 million. Study participants were asked to provide quantitative and qualitative evaluations of their asset managers and investment consultants, including qualitative assessments of those firms soliciting their business and detailed information on important market trends.

The data reported in this document reflect solely the views reported to Greenwich Associates by the research participants. Interviewees may be asked about their use of and demand for financial products and services and about investment practices in relevant financial markets. Greenwich Associates compiles the data received, conducts statistical analysis and reviews for presentation purposes in order to produce the final results. Unless otherwise indicated, any opinions or market observations made are strictly our own.

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